Minutes
Bibliographic Standards Committee
Virtual ALA Annual Meeting
Zoom, June 20, 2023
11:00 am - 1:00 pm EDT

Agenda

1. Welcome and announcements (BSC chairs)
2. Review of draft minutes from the BSC virtual meeting on March 31, 2023 (Grover)
3. Reports on BSC activities
   a. MAC Liaison (Parascandola)
   b. DCRMR Editorial Group (Grzegorski)
   c. Linked Data Implementation Steering Group (Washington)
   d. Diversity, Equity, and Inclusion Steering Group (Cumby)
   e. SCF Editorial Group (Fell)
   f. Program Planning Group (Tuttle)
   g. Web Resources for Rare Materials Cataloger Editorial Group (Druash)
   h. LC Liaison (Théroux)
4. OCLC update and liaison possibility (James)
5. RBMS Documentation Task Force (Dobbs)
6. Closing announcements (BSC chairs, all)

Appendix A: OCLC Update and Liaison Possibility Report

Members present: Zoe Dobbs, Beinecke Library, Yale University (co-chair); Jennifer MacDonald, University of Delaware (co-chair); Jamie Cumby, Grolier Club; kalan Knudson Davis, University of Minnesota; Lori Dekydtspotter, Lilly Library, Indiana University; Tammy Druash, University of North Florida; Stephanie Fell, University of Nevada, Las Vegas; Stephanie Geller, California State Archives; Emily Grover, James Smith Noel Collection (secretary); Jessica Grzegorski, Newberry Library; Martha Lawler, Louisiana State University Shreveport; Deborah J. Leslie, Folger Shakespeare Library; Rafael Linares, La Casa del Libro Book Museum; Danijela Matković, Beinecke Library, Yale University; Allison McCormack, University of Utah; JP Mongeau, University of Delaware; Iris O’Brien, British Library; Jackie Parascandola, University of Pennsylvania; Andrea Schuba, University of Maryland; Noah Sheola, Boston College; Jessie Sherwood, Robbins Collection, University of California, Berkeley; Amy Tims, American Antiquarian Society; Jonathan Tuttle, Harvard University; Brittney Washington, Harry Ransom Center

Members absent: Liz Adams, Rubenstein Library, Duke University; Erin Blake, Folger Shakespeare Library; Brenna Bychowski, Beinecke Library, Yale University (ex officio: Controlled Vocabularies Editorial Group co-editor); Patrick Crowley, Southern Connecticut State University; Laura Doublet, University of Victoria; Matthew Ducmanas, Temple University; Ryan Hildebrand, University of Oregon; Yoonha Hwang, Harvard College Library; Matthew Murphy, Milwaukee Public Library; Amanda Sprochi, University of Missouri
**Liaisons:** Manon Théroux, Library of Congress (Library of Congress liaison); Diane Dias De Fazio, Cleveland Metroparks (Member-at-Large to the BSC)

**Visitors:** Nicole Becwar, Colorado School of Mines; Maren Cornett, University of Delaware; Evelyn Davis, Prairie View A&M University; Christine DeZelar-Tiedman, University of Minnesota; Jennifer Dunlap, Houghton Library, Harvard University; Cynthia Franco, Southern Methodist University; Rebecca Giguere, American Antiquarian Society; Maria Gorbunova, Princeton University; Jana Gowan, Helmerich Center for American Research/Gilcrease Museum; Paloma Graciani Picardo, Harry Ransom Center; Libby Hertenstein, Ohio State University; Sarah Horowitz, Haverford College; Linda Isaac, Houghton Library, Harvard University; Kate James, OCLC; Francis Lapka, Yale Center for British Art; Martha McTear, University of Washington; Tarienne Mitchell, Library of Congress; Jean Moats, Johnson & Wales University; Honor Moody, Harvard Library; Kate Moriarty, Saint Louis University; Alicia Murphy, American Antiquarian Society; Lesley Parilla, George Washington’s Mount Vernon; Audrey Pearson, Beinecke Library, Yale University; Hannelore Segers, Beinecke Library, Yale University; Graham Skinner, Houghton Library, Harvard University; Kelly Stapleton, University of Texas at Dallas; Rachel Telford, Library of Congress

**Acronyms:**

- **ALAIR** American Library Association Institutional Repository
- **ARM** Art and Rare Materials Ontology BIBFRAME extension
- **BC/AD** Before Christ/Anno Domini (Dating System)
- **BCE/CE** Before Common Era/Common Era (Dating System)
- **BSC** Bibliographic Standards Committee
- **CERL** Consortium of European Research Libraries
- **DCM** Descriptive Cataloging Manual (LC)
- **DCRM(G)** Descriptive Cataloging of Rare Materials (Graphics)
- **DCRMR** Descriptive Cataloging of Rare Materials (RDA Edition)
- **DEI** Diversity, Equity, and Inclusion
- **DOI** Digital Object Identifier
- **IFLA** International Federation of Library Associations and Institutions
- **ILS** Integrated Library System
- **LC** Library of Congress
- **LCGFT** Library of Congress Genre/Form Terms
- **LCNAF** Library of Congress Name Authority File
- **LCSH** Library of Congress Subject Headings
- **LD4P** Linked Data for Production
- **LDI** Linked Data Implementation
- **MAC** MARC Advisory Committee
- **MGD** Metadata Guidance Documentation
- **NACO** Name Authority Cooperative Program (LC)
- **PCC** Program for Cooperative Cataloging
- **PS** Policy Statement
- **PTCP** Policy, Training, and Cooperative Programs (LC Division)
- **RDA** Resource Description and Access
- **RMAG** LD4P Rare Materials Affinity Group
- **SAA** Society of American Archivists
1. Welcome and announcements

The co-chairs welcomed attendees and reviewed meeting norms. Andrea Schuba monitored chat participation.

2. Review of draft minutes from the BSC virtual meeting on March 31, 2023 (Grover)

The draft minutes were approved via a Zoom poll during the meeting.

3. Reports on BSC activities

   a. MAC Liaison (Parascandola)

Jackie Parascandola submitted a report on the status of the 245 $i$ MARC Discussion Paper (see versions with in-text examples and linked examples). The 245 $i$ Working Group submitted a Discussion Paper to MAC. While the MAC/LC committee supported the creation of a subfield that provides the source of harmful language, the committee was dissatisfied with the proposed solution. MAC recommended that the 245 $i$ Working Group refine the subfield so that it would be used exclusively for the purpose of contextualizing harmful language transcribed in the 245 field. The Working Group’s writing committee plans to edit the 245 $i$ proposal accordingly and submit a revised Discussion Paper to MAC in time for the next cycle, which begins January 2024. Feedback and suggestions may be emailed to Jackie Parascandola at jpara@upenn.edu.

   b. DCRMR Editorial Group (Grzegorski)

The chief editors submitted a report, and Jessica Grzegorski presented on the group’s recent activities. At the end of the term on June 30, 2023, three group members will rotate off; Laura Doublet will replace Grzegorski as the new co-chief editor, but Grzegorski will remain as a volunteer member for one year. The Editorial Group expressed their thanks to the departing members for their dedication and service, with special thanks to kalan Knudson Davis for her work on the GitHub repository.

DOIs have been created for the overall DCRMR repository as well as for individual releases. Two current Editorial Group members and one former member will lead a DCRMR workshop at the RBMS 2023 Conference in Bloomington, IN.
After completing an initial internal review of the incorporation of DCRM(G), the Editorial Group has formed three subgroups to target lingering issues with integration into DCRMR: Chapter 5 (focusing on integrating elements related to production of unpublished materials), Chapter 6 (focusing on physical description instructions), and Examples (to develop criteria to evaluate cultural sensitivity and to review examples for their instructional value and recommend additions where needed). After the subgroups complete their work by the end of Fall 2023, the Editorial Group plans to do a second internal review of DCRM(G) integration before submitting the text for full BSC review.

In May, the subgroup tasked with drafting policy statements for the RDA Toolkit completed an initial internal review of all PSs crafted to date, which totals about 900. The DCRMR Editorial Group expects to begin its review this summer, and afterward the PSs will be submitted to the full BSC for review and voting before publication to the RDA Toolkit.

BSC-authored materials will not be available in the reconfigured version of Cataloger’s Desktop. Examples that are only available in Cataloger’s Desktop will be compiled and preserved in a PDF document that will be deposited in the ALAIR.

c. Linked Data Implementation Steering Group (Washington)

Brittney Washington submitted a report and presented on the group’s projects and membership status. In partnership with the DCRMR Editorial Group and using DCRMR as the guiding cataloging manual, the LDI Steering Group has completed review of Sinopia’s resource templates for rare book cataloging, which the LD4P Rare Materials Affinity Group creates using Art and Rare Materials Ontology. The LDI Steering Group, DCRMR Editorial Group, and RMAG have focused their efforts on developing resource templates for the item profile. The review has uncovered only a few issues in the compatibility between DCRMR and the Sinopia resource templates.

Additionally, the LDI Steering Group has worked on a project to map ARM classes and subclasses to RDA elements. However, the group has found that DCRMR cataloging environments that do not use RDA elements should have little difficulty implementing ARM. More issues between DCRMR and linked data may arise once the group begins developing the instance-level profile.

All members of the LDI Steering Group will rotate off at the end of the term. Washington recommends successors work on the following projects: ARM maintenance and improvement, linked data profiles development, and educational outreach.
d. Diversity, Equity, and Inclusion Steering Group (Cumby)

Jamie Cumby submitted a report and presented on the group’s activities over the past year. After examining potential projects compiled by the task group that preceded it, the DEI Steering Group selected three projects on which to focus:

1. Developing guidelines and advocacy resources around harmful language statements and publishing these to the RBMS website
2. Creating guidelines for mentoring catalogers from underrepresented groups (in collaboration with the RBMS Mentorship Committee and SAA volunteers).
3. Developing a proposal for a BSC internship opportunity for early career catalogers who are members of marginalized communities. Once the proposal is finalized, the Steering Group plans to submit it for funding to sponsor the intern’s membership dues.

The DEI Steering Group collaborated on the 245 $i project and expressed its availability for consultation on other BSC projects. The Steering Group added 8 members as a result of a call for volunteers outside BSC and plans to continue to recruit and support non-BSC volunteers. The group issued a call for a co-chair.

e. SCF Editorial Group (Fell)

The co-editors submitted a report, and Stephanie Fell reported on the Editorial Group’s activities and membership changes. Co-editor Matt Ducmanas will be rotating off at the end of term; Gina Solares will be the new co-editor. Since January 2023, the group has published 18 new citation forms and corrected 2 existing forms. Statistics for website traffic over the past five months are comparable to those reported for the final five months of 2022. The Editorial Group has finished adding the WikiData URIs created by Yale to the SCF database. For the next phase of the linked data initiative, the group plans to create WikiData entities for SCFs that were added since the completion of Yale’s project as well as for future additions.

f. Program Planning Group (Tuttle)

Jonathan Tuttle submitted a report and presented on the group’s activities and membership changes. In their second year of the extra-conference programming initiative, the Program Planning Group hosted two webinars: “Cool Things We’ve Cataloged” in Fall 2022 (203 attendees) and “Cataloging Artists’ Books” in May 2023 (288 attendees). For a link to a recording of the latter, please email Jonathan Tuttle at jonathan_tuttle@radcliffe.harvard.edu.

Five BSC-endorsed sessions will be held at RBMS 2023 in Bloomington, IN: “Cataloging Rare Books with Descriptive Cataloging of Rare Materials (RDA Edition)” (in-person); “Metadata as Outreach: Using New Data Visualization Tools to Reimagine Collections” (hybrid); “Cataloging Materials Written in a Script You Don’t Know” (that is, non-Latin scripts) (in-person); “Documenting Local Cataloging Practices” (virtual); and “Leveraging Linked Data Tools for Rare Books and Special Collections” (virtual).
At the end of term, three members are rotating off. The Program Planning Group invites new ideas for professional development programming.

**g. Web Resources for Rare Materials Cataloger Editorial Group (Druash)**

Tammy Druash submitted a report and presented on the group’s activities. Over the past year, the Web Resources for Rare Materials Cataloger Editorial Group has focused efforts on website maintenance. Some resources are temporarily down, but most of the 32 broken links have been corrected. Two new resources have been added: Pictorial Cloth Bindings (University of Florida) and the Purdue Paleography Project. Work continues on applying editorial guidelines to the citations. The group welcomes suggestions for new resources; please contact Tammy Druash at t.druash@unf.edu.

**h. LC Liaison (Théroux)**

Manon Théroux submitted a report and presented highlights from developments at the Library of Congress generally and the Program for Cooperative Cataloging in particular. For staffing changes, Mark Dimunation, Rare Books and Special Collections Division Chief, has retired; the Policy, Training, and Cooperative Programs Division has lost 2 staff members.

The Rare Materials Section recon project is slated to end July 2023, but two in-process collections (Raymond Toinet Collection and Dime Novels) may not be completed before the contract deadline. On August 1, 2023, Cataloger’s Desktop will end and be replaced with Classification Web Plus, a service that will include cross-document searching for selected LC- and PCC-authored resources only. LC documentation on Cataloger’s Desktop will be available as free PDFs on the LC website.

A new target date for the LC-PCC implementation of Official RDA has been set; implementation will occur on a rolling basis between May 1, 2024 and April 30, 2027. LC-PCC Policy Statements for Official RDA continue to be updated; LC-PCC Metadata Guidance Documentation efforts have focused on addressing “string encoding scheme” instructions in Official RDA. The PCC Task Group to Test the Official RDA Toolkit presented preliminary findings at the May 2023 PCC Operations Committee Meeting. The Task Group plans to release final results in two stages: 1) Recommended changes to LC-PCC PSs and MGDs and 2) Final report and recommendations. Catalogers should not use LC-PCC PSs and MGDs until the implementation phase of the Official RDA Toolkit.

LC has implemented Thai and Armenian scripts in its bibliographic records. In LC/NACO news, the DCM Z1 section was updated in February 2023.

LCSH updates include the formation of an Indigenous Headings Consultant Group to evaluate subject headings for Indigenous peoples of North America; completion of a project to capitalize “Indigenous”; proposal to use family names established in the LCNAF as subject access points.
in bibliographic records (see white paper); experimentation with removal of $v$ Drama from bibliographic records for audiovisual materials and preliminary exploration of abandoning form subdivisions in favor of full LCGFT implementation; change of “Mormon” to the preferred “Latter Day Saint” and “Gays” to “Gay people”; and initial discussion of using BCE/CE instead of BC/AD dates in LCSH and LCNAF. The experiment to streamline the LCSH approval process with use of “expedited lists” has been abandoned as unfeasible.

An internal LCGFT group has created more instruction sheets for the manual; an external advisory group has been formed to assist with genre/form headings and policies.

In PCC news, starting August 15, 2023, creators of non-Latin script cross-references in NACO records may set the MARC 008/29 fixed field value to “a” (evaluated) instead of “b” (not evaluated) and will not be required to add a 667 note stating that a non-Latin script cross-reference has not been evaluated. PCC has issued a newly revised Arabic NACO manual as well as DEI guiding principles for metadata creation. The PCC elected three new Policy Committee members-at-large; they will begin their terms in October 2023.

The BIBFRAME pilot project has redirected efforts from creating descriptions to improving the editor, known as Marva. A new romanization tool has been added to Marva. LC plans to implement BIBFRAME once the new FOLIO ILS has been launched. Testing of the Marva editor will begin in Fall 2023; implementation is expected in Fall 2024.

4. OCLC update and liaison possibility (James)

Kate James shared some updates from OCLC and offered a liaison opportunity.

Jay Weitz is retiring at the end of June; friends and colleagues are welcome to share their thoughts and wishes on the Kudoboard. James will be available for any assistance and may be reached by email at jamesk@oclc.org.

On June 6 and June 15, James and Weitz gave Virtual AskQC Office Hours (VAOH) presentations on cataloging rare materials defensively. VAOH offers monthly webinars that are free to attend (see schedule). The same presentation is offered at two different times to accommodate attendees on both the East Coast and West Coast. The Bibliographic Formats and Standards 247 Former Title page has been updated so that guidance, originally focused on continuing resources, has been expanded to account for archival collections whose names may change over time. OCLC will hold a Catalogers’ Community Meeting at ALA Annual.

The proposal for an OCLC liaison to the BSC received favorable feedback. On July 14, 2023, James submitted a report (see Appendix A) of information presented at the BSC Annual Meeting of June 20.
5. RBMS Documentation Task Force (Dobbs)

Zoe Dobbs issued a second call for a volunteer for the RBMS Documentation Task Force, which has officially been charged by the RBMS Executive Committee to migrate files from the rbms.info server to the ALAIR. The Task Force seeks a member with knowledge of bibliographic standards; BSC membership is not required to serve. Those interested in volunteering may reach out to the co-chair Melissa Hubbard at melissa.a.hubbard@gmail.com.

6. Closing announcements (BSC chairs, all)

Co-Chair Jennifer MacDonald acknowledged and thanked BSC members who are rotating off at the end of the membership cycle on June 30 and welcomed the twelve incoming new members. The BSC Activities Survey will be posted to the RBMS BSC thread on ALA Connect and will also be sent as a separate email to new members very soon; the survey is due July 21, 2023.

After physically being closed for several years for renovation, the Folger Shakespeare Library will reopen to the public on November 17, 2023. The reading room will reopen with limited service since not all of the collections have been returned to the building from offsite storage.

Recordings of talks delivered at the Libraries in the Time of War Symposium, co-organized by the IFLA Rare Books and Special Collections Section and CERL, are now available on YouTube: https://www.youtube.com/@iflararebooksandspecialcol3927

The meeting closed at 12:32 PM EST.

Respectfully submitted July 24, 2023, by Emily Grover, RBMS Bibliographic Standards Committee secretary.
Appendix A: OCLC Update and Liaison Possibility Report

To: RBMS Bibliographic Standards Committee  
From: Kate James, OCLC  
Re: OCLC Update  
Date: Submitted July 14, 2023 (This update was given at the June 20 meeting.)

This update contains OCLC cataloging-related news. I would be happy to provide updates like this at future Bibliographic Standards Meetings if there is interest.

Documentation
We have made an update to Bibliographic Formats and Standards, that may be of interest to special collections catalogers. The 247 Former Title page has been updated to make it clear that it may be used for resources besides serials and integrating resources. The Guidelines section now includes a subsection for “Archival materials” with instructions about using this field when a devised title for an archival resource has been changed.

VAOH (Virtual ASKQC Office Hours)
- In June, the Virtual ASKQC Office Hours (VAOH) session was “Cataloging Rare Materials Defensively,” given by Jay Weitz and me. The recordings, slides, etc., are currently located on this page:  
  https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/075_2023_AskQC_office_hours
- Upcoming sessions of VAOH are listed here:  
  https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Current_AskQC_office_hours
  - In July, senior editor Alex Kyrios and editor-in-residence Kathryn Becker will present “Debiasing Dewey: Righting the past by rewriting the classification.”
  - In August, OCLC’s Grace McGann will present “Rapid Harm Reduction with Locally Preferred Subjects in WorldCat Discovery.”
  - In September, I will be presenting the session “Get Informed about Genre/Form Terms.”
  - We do not have our October topic yet. We will update the VAOH website when we have that information.
  - In November, I will be presenting “MARC Fields for Manuscripts and Archival Collections.” This will be an overview for catalogers who do not regularly catalog these resources.

Other News
- Jay Weitz is retiring June 30, 2023. There is a virtual kudos board if anyone would like to post a message wishing Jay well:  
  https://www.kudoboard.com/boards/ZitBYY5P.
- OCLC will have our Cataloging Community Meeting at ALA on June 23, 10:30 am-12:00 pm in McCormick W179A.